Appointment process user guide – October 2009

This user guide has been developed to support Appointments Secretaries in administering the new appointment process.

It is split into the following sections:

1 Logging in to the system

Fig. 1

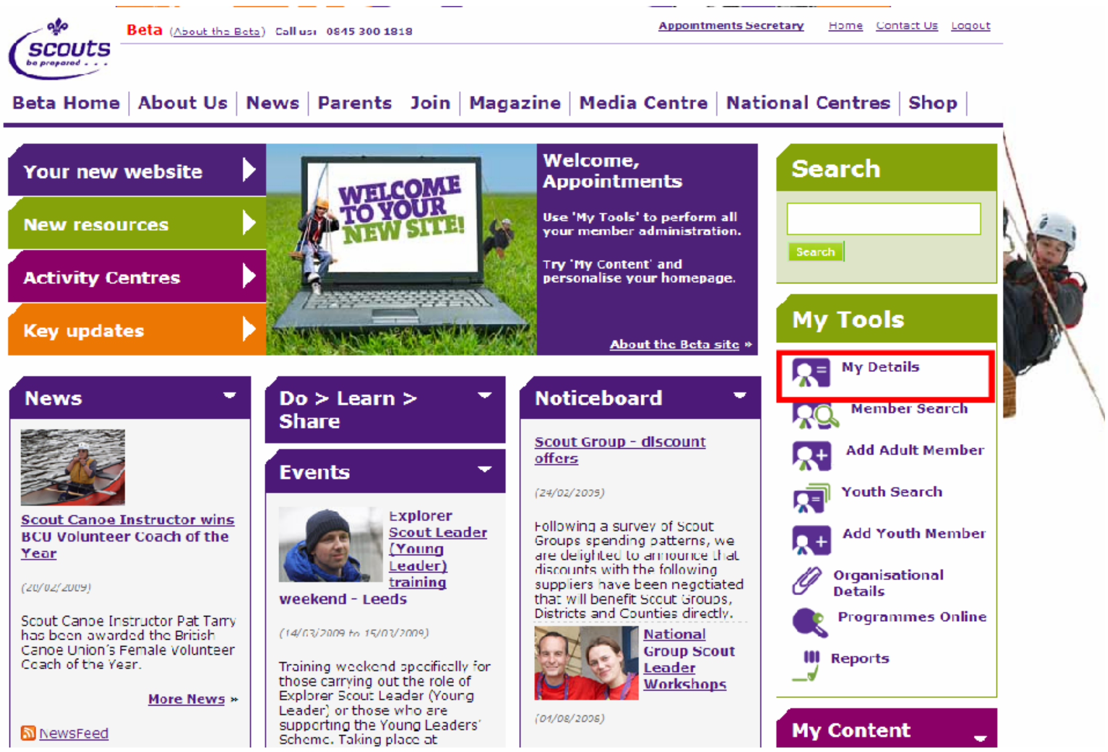
You can access the online tools by logging in to www.scouts.org.uk. If you have registered for this or Programmes Online, simply log straight into the system using your user name and password.

If you have registered before but cannot remember either your username or password, you can use the links under the log-in box. You will be asked for your Membership number, e-mail address, date of birth and if requesting your password, your username.

Note: the e-mail address you enter has to match the one we have recorded for you on the system.

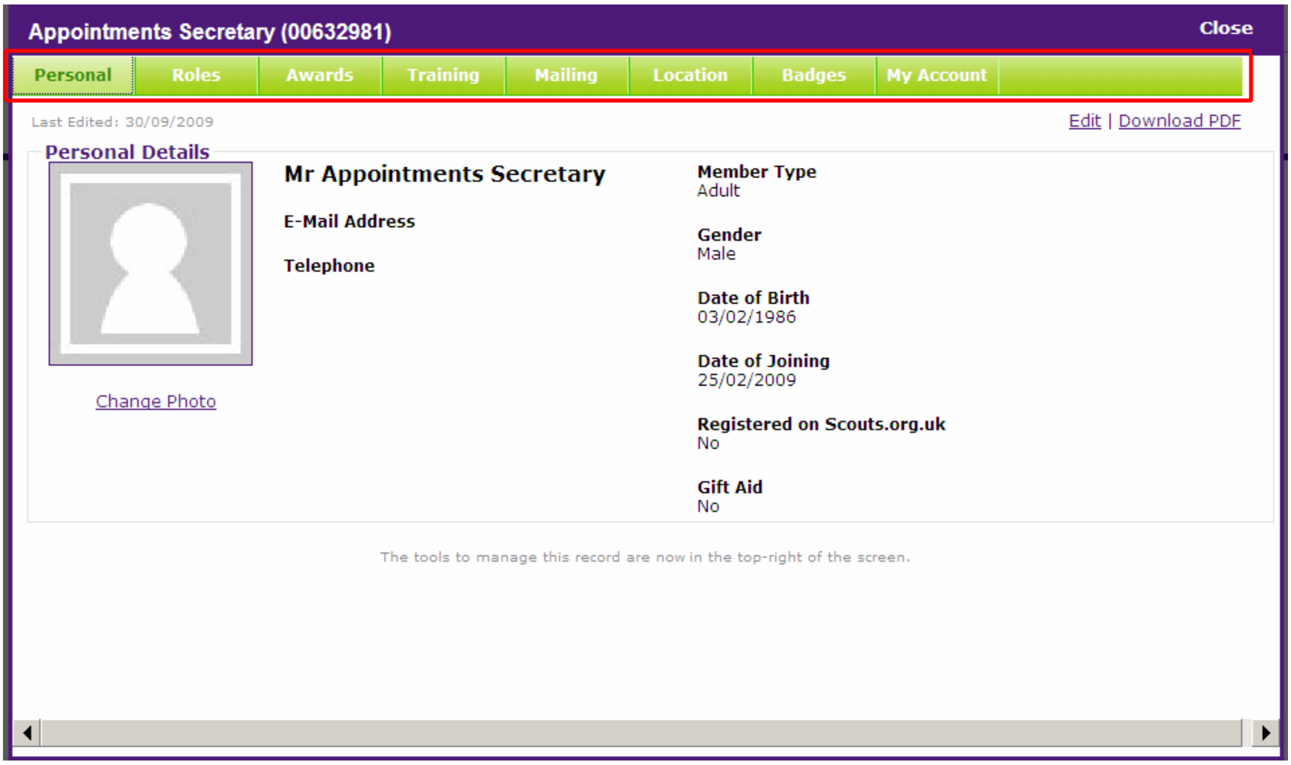
2 My details

Fig. 1



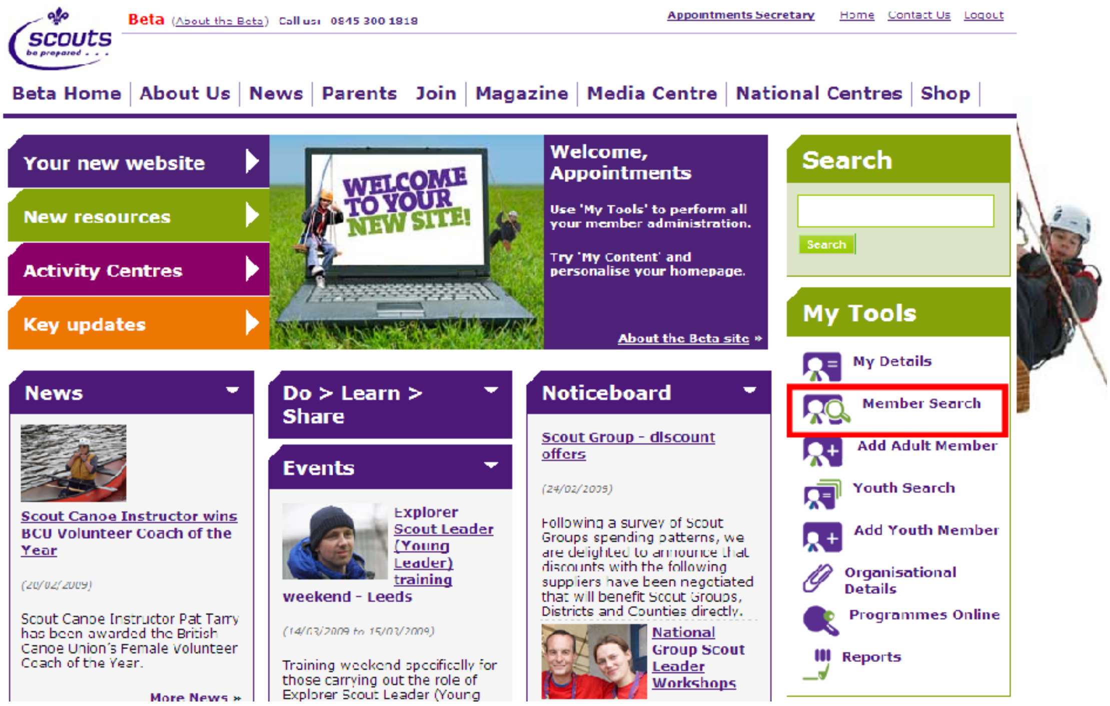
Individuals can check their own details and edit their contact details; can view and edit their mailing options/magazine supplements; can edit their location; and can add a photo to their record. All this can be done by using the tabs at the top of your record (as in Fig. 2 below).

Fig. 2



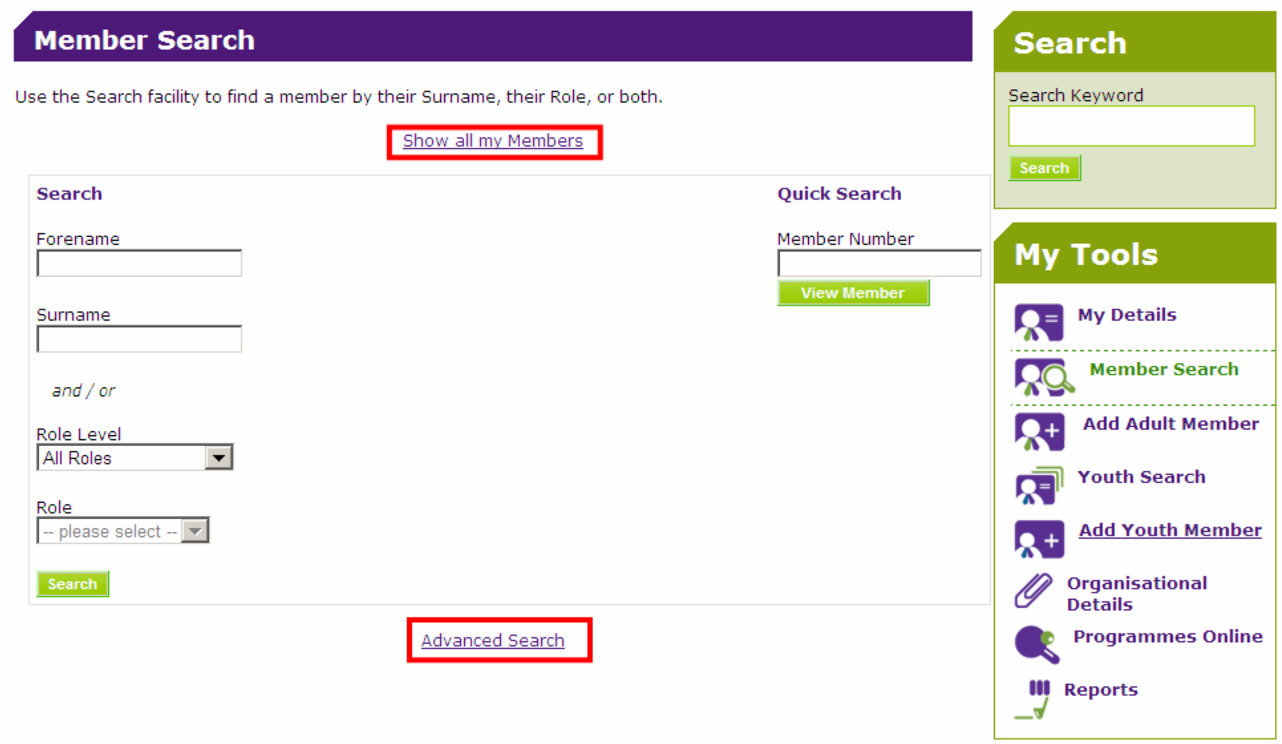
3 Member search

Fig. 1



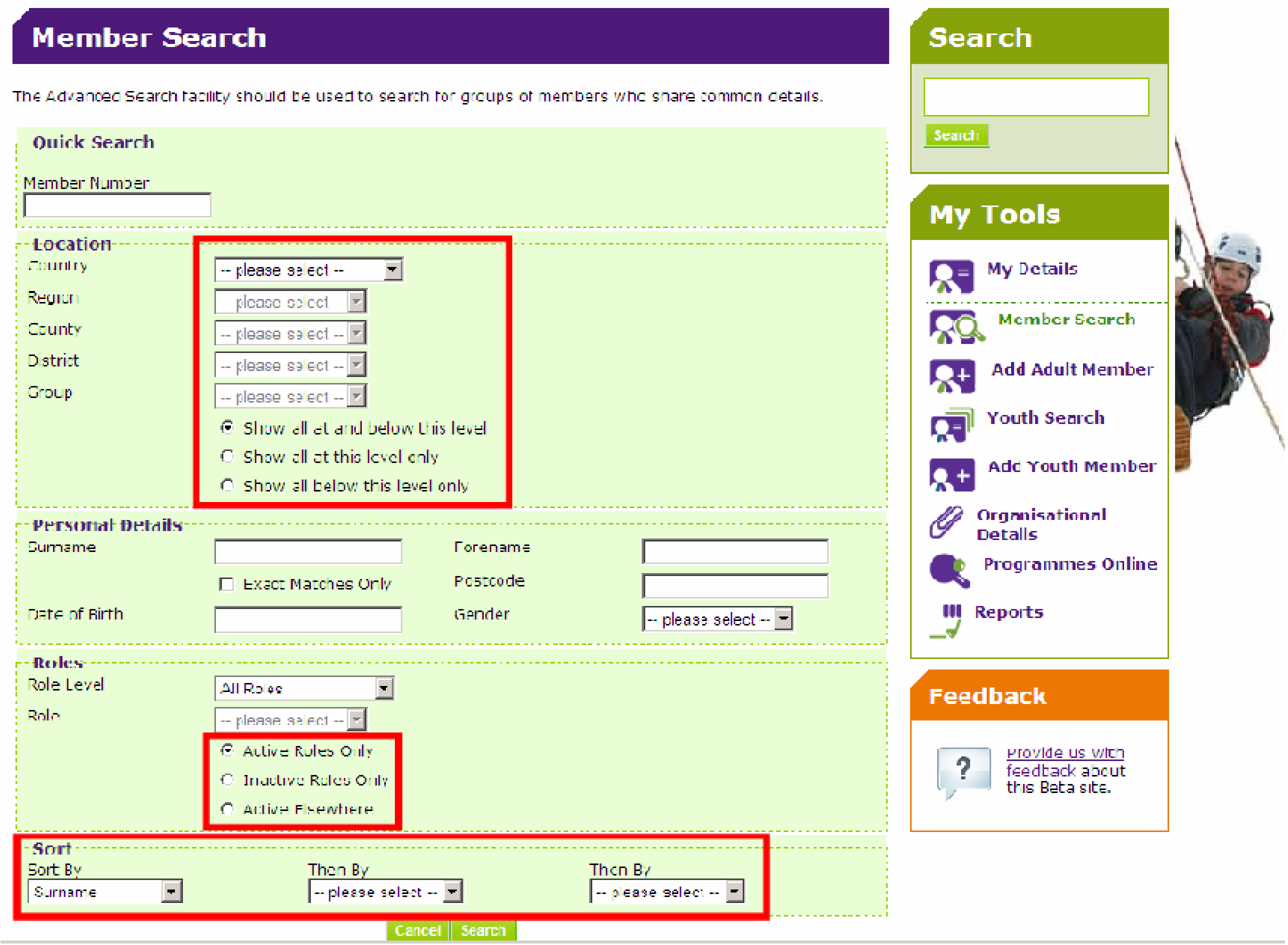
You can search for Members in your County/District/Region and the data that is returned depends on your role.

Fig. 2



The ‘Show all my Members button’ will bring up a list of all the adults in your particular area. You can also search for a particular member using their Membership number, or by searching for their name and/or role. You need to click on the ‘Search’ button once you’ve entered the details (just pressing ‘Enter’ on the keyboard won’t do anything). If you want to search using more information, use the ‘Advanced Search’ option.

Fig. 3



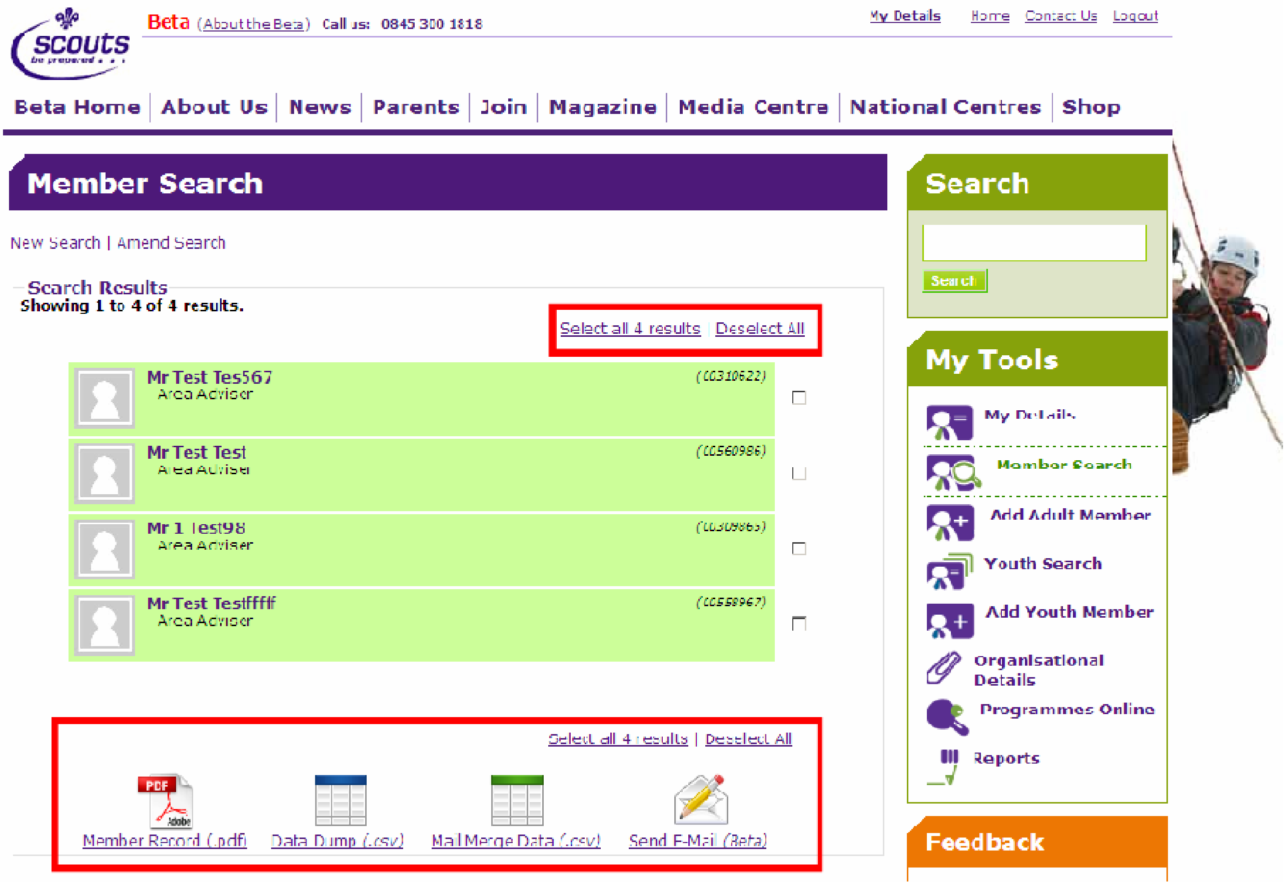
The advanced search allows you to search for roles at a range of different levels, including at Group and District level. It also allows you to search using personal details such as postcode and date of birth. You can also search for inactive roles (usually used for recruitment purposes where a District wants to contact past volunteers and see whether they would be interested in joining again). Once you have chosen what you want to search for, you can then choose to sort the search results to suit your needs (all shown in Fig. 3 above).

Once you have the search results up, you can export them into an Excel spreadsheet and then sort and filter the data however you like.

You can also extract the data for a mail merge, export the data into a pdf file, or send an e-mail to all those members. If you choose to send an e-mail, the system will tell you how many Members do not have e-mail addresses and will give you the option of exporting this data for a mail merge (shown in Fig. 4 below).

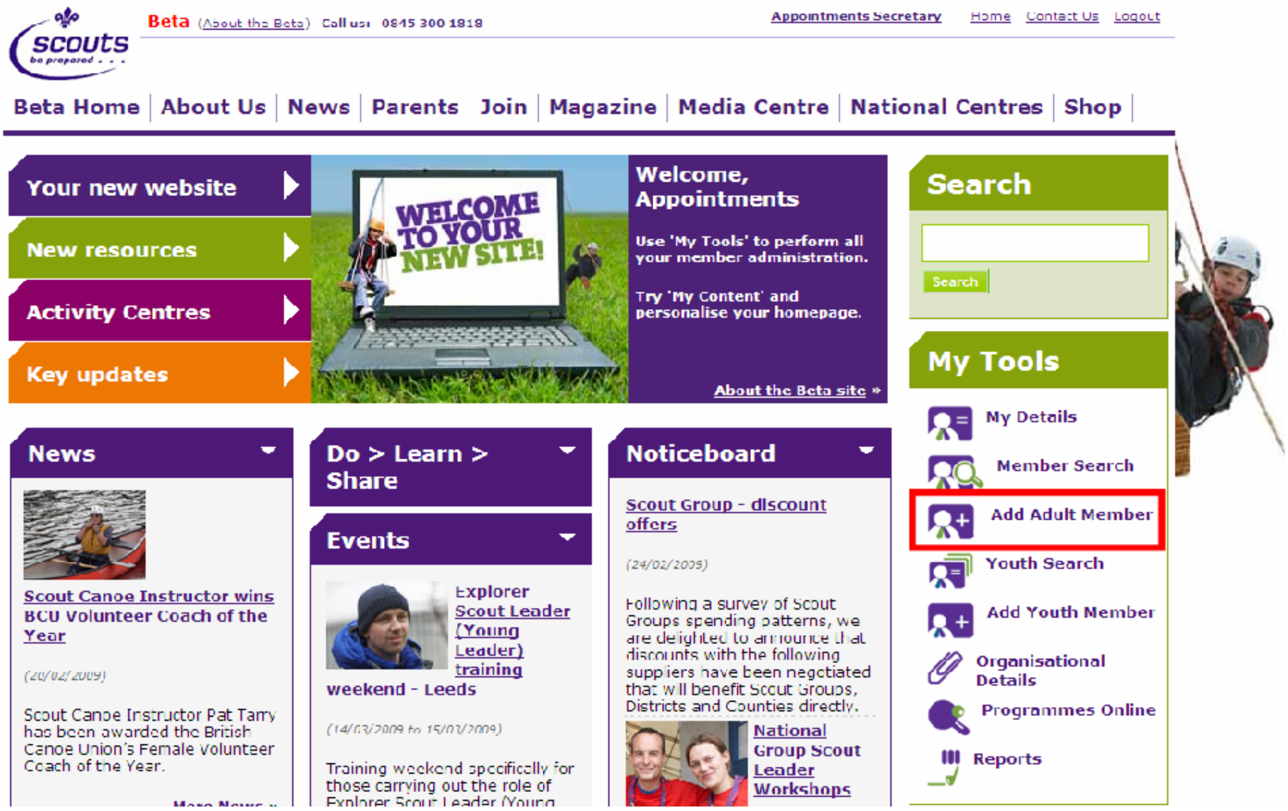
Please note: The facility to send e-mails is a future enhancement to the system. It is currently being tested and we hope that this will be available to all in the near future.

Fig. 4


Beta (About the Beta) Call us: 0845 300 1818
My Details
Home Contact Us Logout
Beta Home | About Us | News | Parents | Join | Magazine | Media Centre | National Centres | Shop
Member Search
New Search | Amend Search
Search Results
Showing 1 to 4 of 4 results.
Select all 4 results Deselect All
Mr Test Tes567
Area Adviser
Mr Test Test
Area Adviser
Mr T Test98
Area Adviser
Mr Test Testfffff
Area Adviser
Select all 4 results | Deselect All
Member Record (.pdf)
Data Dump (.csv)
Mail Merge Data (.csv)
Send E-Mail (Beta)
Search
Search
My Tools
My Details
Member Search
Add Adult Member
Youth Search
Add Youth Member
Organisational Details
Programmes Online
Reports
Feedback

4 Adding a Member

Fig. 1



Once the AA Form has been completed correctly and checked, the details can then be entered onto the online system.

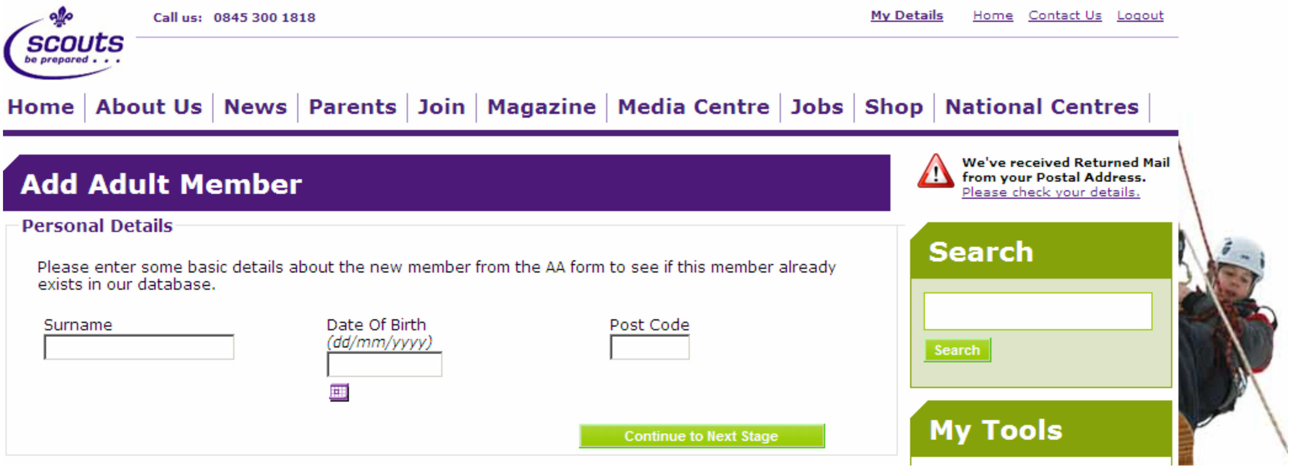
Some things to check for are:

- that the Declarations are signed;
- that the line manager has signed the form to say that they support the application;
- that any special needs are made a note of. These should be queried to ensure that their line manager has taken into account any additional support that may be needed. More information about special needs can be found in the factsheet section of www.scoutbase.org.uk; and
- that the minimum Membership requirement for the role is chosen (i.e. Member, Associate Member, non-Member). This information can be found at www.scouts.org.uk/appointment in POR: The Appointment Process and in the Guide to Appointing Adults. In both cases, the information can be found in a table at the end of the document.

If the Member that you want to add already has a record, you can use the 'Member search' function to find them and add the role to their record. ***Go to Fig. 4 below.***

If they are a completely new Member, click on the 'Add Adult Member' button (as in Fig. 1 above). ***Go to Fig. 2 below.***

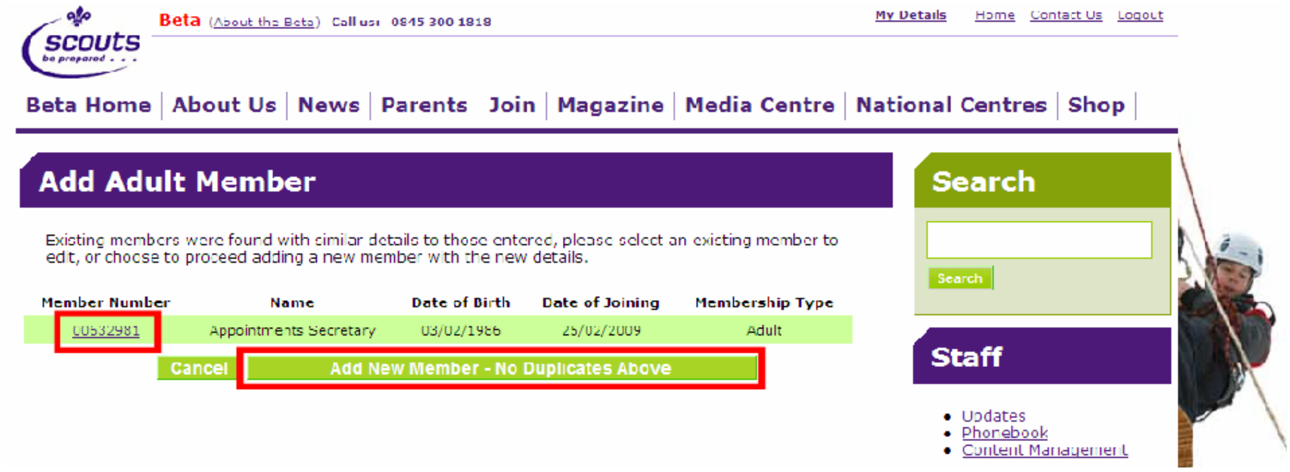
Fig. 2



You will be asked to add some key information so that the system can search to see if the member already exists. If they do not already exist on the system, the screen in **Fig. 4** will appear, where you will be asked to enter the rest of their personal details.

If there is a possibility that they do already exist on the system, the screen in **Fig. 3** will appear, where you will need to decide if that is the same person you are trying to add.

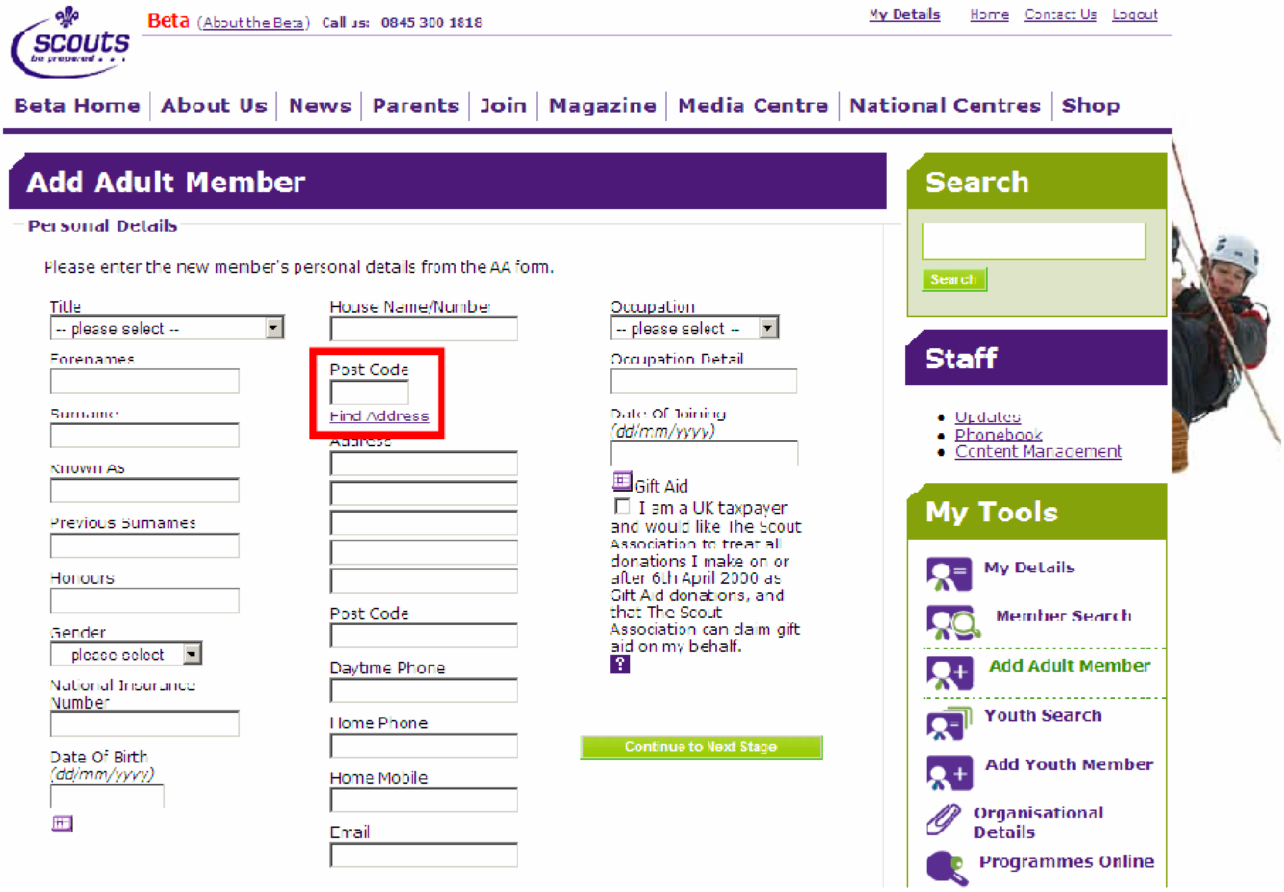
Fig. 3



If the person that appears is the person that you are trying to add, click the membership number which will take you to their record. The screen shown in **Fig. 5** will then appear.

If the person that appears is **NOT** the person you are trying to add, click 'Add new member'. This will create a new record and will take you to the screen shown in **Fig. 4**, where you can enter the rest of their personal details.

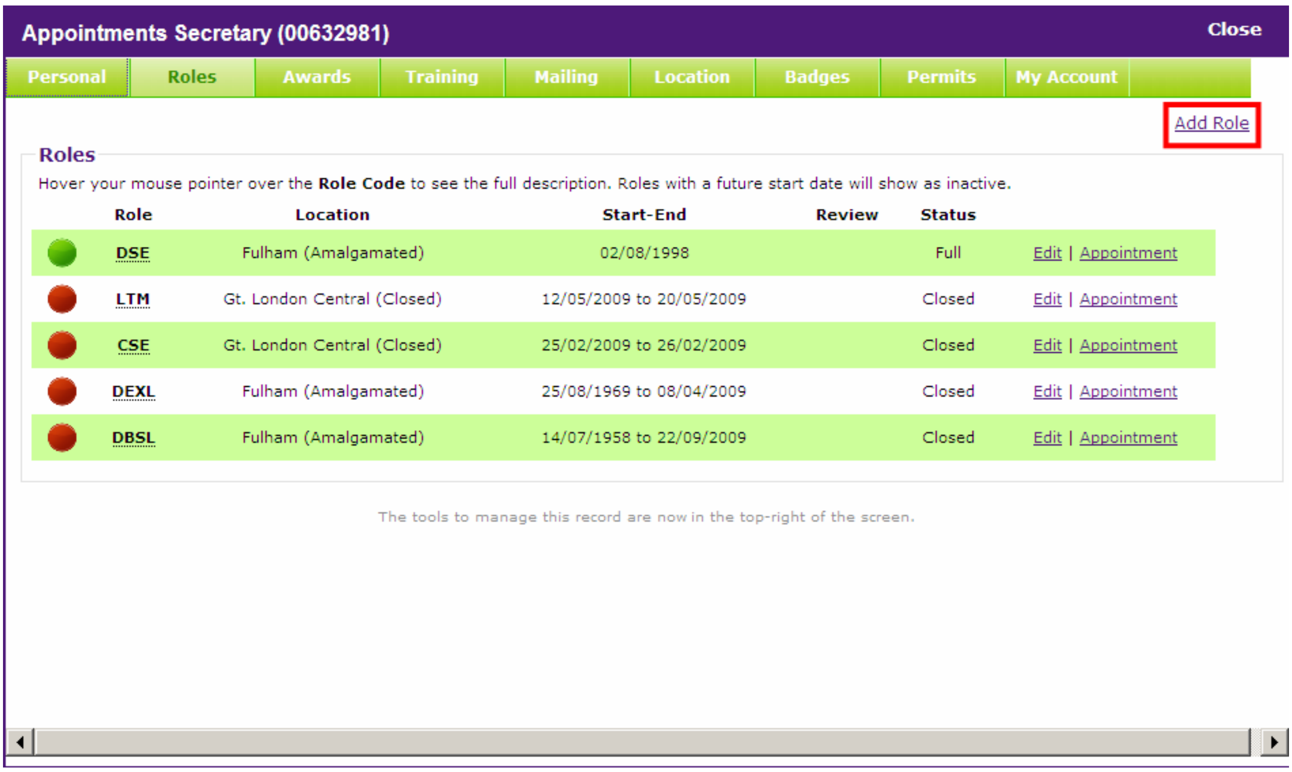
Fig. 4



The details are added to the system. The 'Find Address' box can be used to reduce the amount of data input needed. By entering the postcode and clicking 'Find', the address should automatically appear.

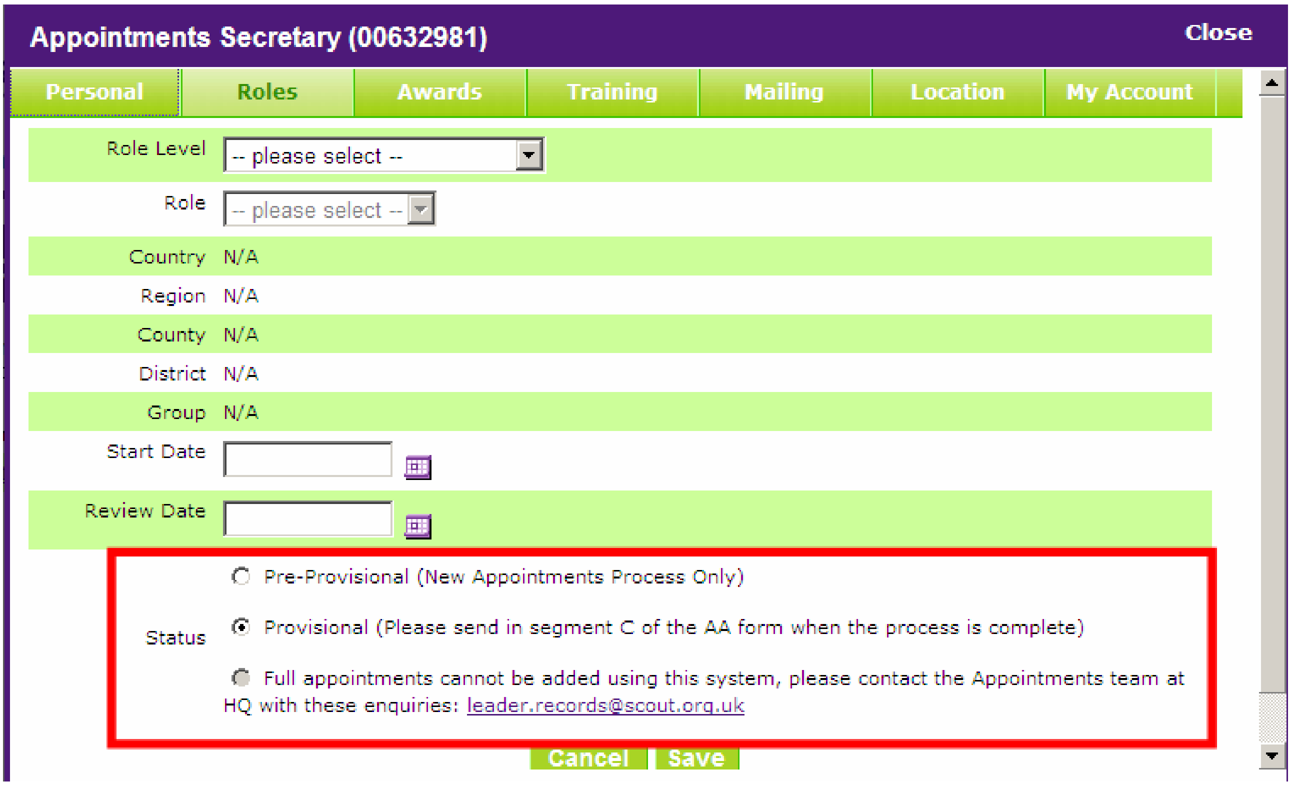
Note: The house number or name needs to be added.

Fig. 5



The record will appear and will automatically take you to the ‘Roles’ tab. Select ‘Add role’. If they have other roles, these will appear on the screen as well.

Fig. 6



You will be asked to choose the level of the role (i.e. Group) and then select the role and place them in the correct location.

There are three status options, as below:

Pre-provisional: this is for the new appointment process. Any role added using the new appointment process must be added as this status. This is because the provisional appointment now comes later in the process.

Provisional: this is for the current appointment process. The provisional appointment is added locally and then Section C needs to be sent to the Appointments & Membership Team to be updated to a full appointment.

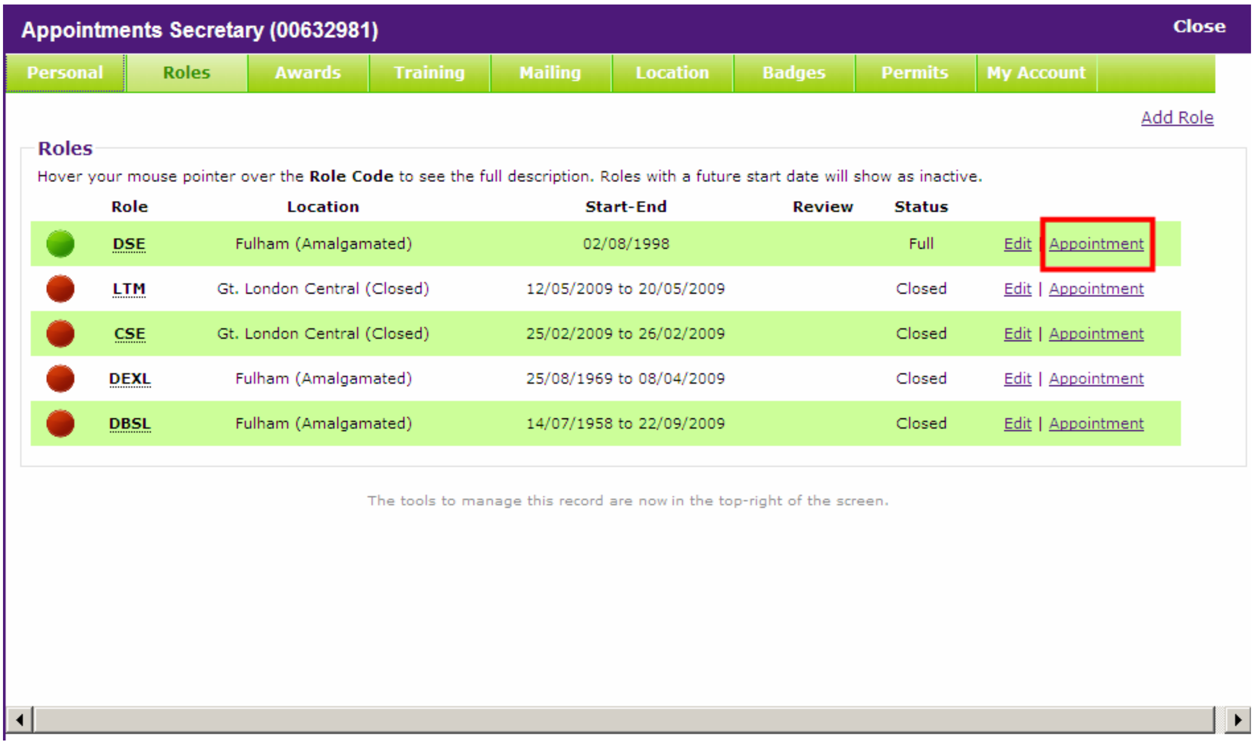
Full: Full appointments cannot be added to the system straight away. They will need to be added as pre-provisional appointments and their progress through the appointment process recorded to make them a full appointment (see Chapter 5). Alternatively, please contact the Appointments & Membership Team who will be able to provide you with further guidance.

4.1 Adding historical roles

If you need to add historical roles, follow the Add Member/Role process as above and enter the original start date of the appointment. You can then make the appointment ‘full’ by recording the progress of the appointment as described in the next chapter. You will be asked to add the dates on which the various approval checks were completed. If you don’t have a record of these dates, you can add today’s date to ensure that all the boxes are completed and the appointment made ‘full’.

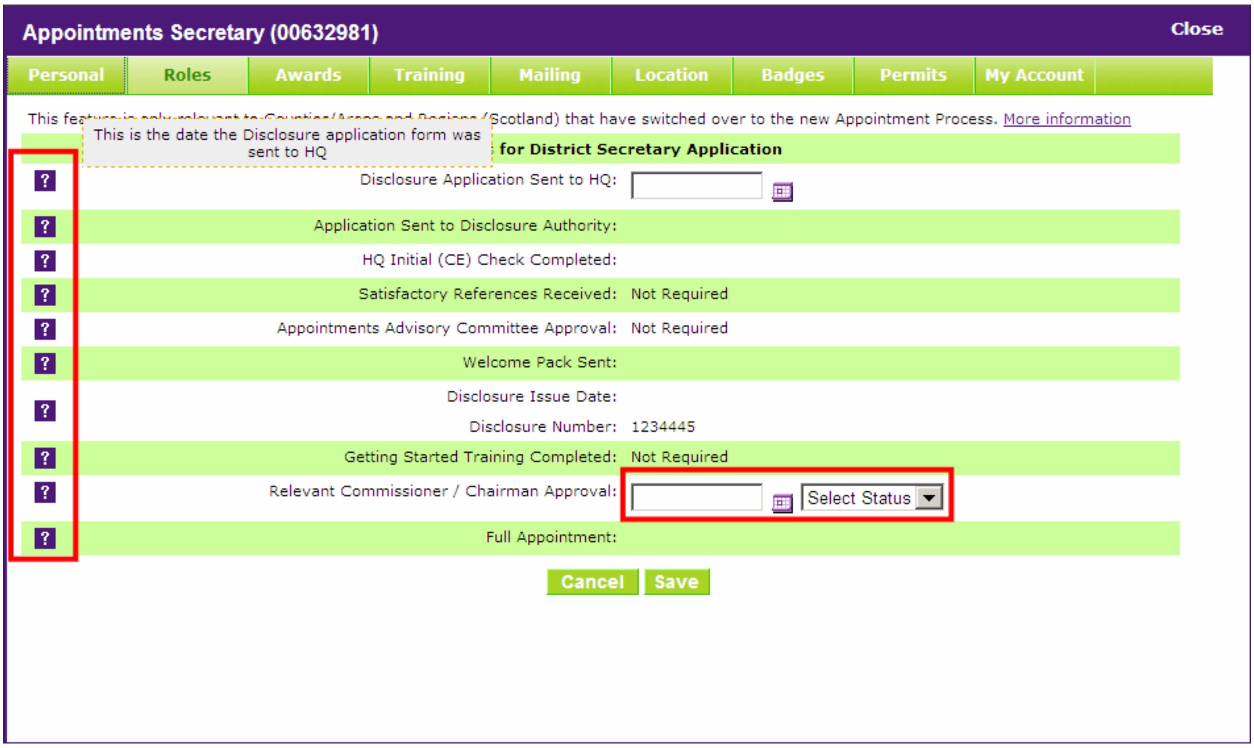
5 Tracking the progress of an appointment

Fig. 1



To record the progress of an appointment, find the Member's record and go to the 'Roles' tab. You will then need to click 'Appointment' and then click 'edit'.

Fig. 2



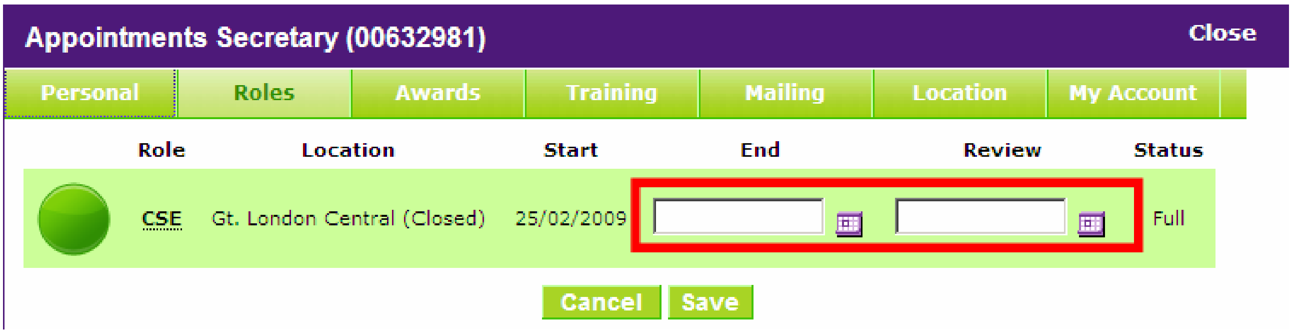
The boxes available to edit will depend on the role that is being applied for. The CRB and initial check box is updated automatically by HQ. The 'Help' function is available to explain how to use the boxes. If you are ever unsure of the boxes that appear, what to enter, or find that initial check or CRB information does not automatically appear, just contact the Appointments & Membership Team.

6 Cancelling appointments and adding/changing review dates

Fig. 1

To cancel the appointment or change the review date, click on 'Edit' for that particular role. Then simply enter the relevant date and click 'Save' (as shown in Fig. 2 below).

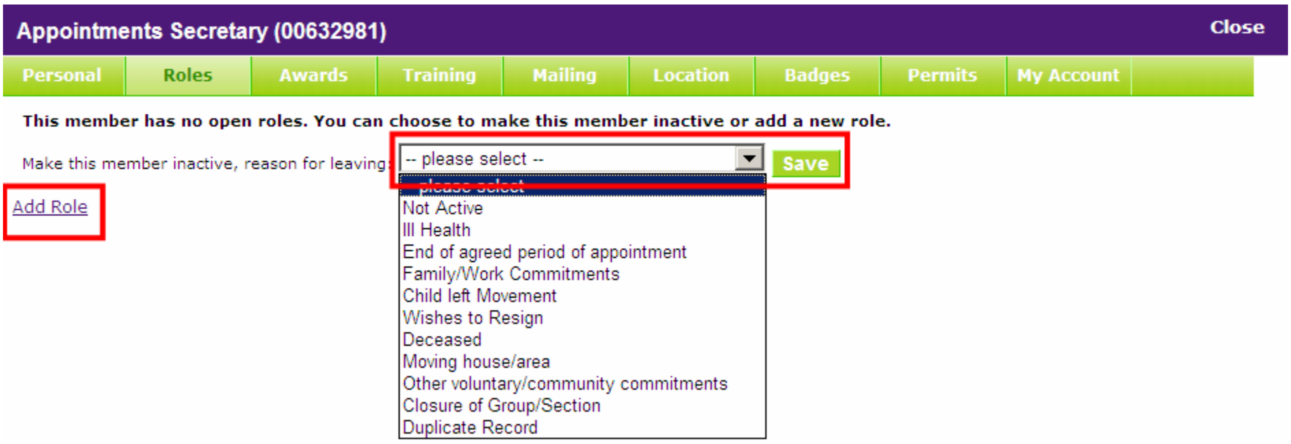
Fig. 2



If you cancel an appointment and that Member has no other active roles, you will be asked whether you would like to lapse their appointment, or create a new role for them.

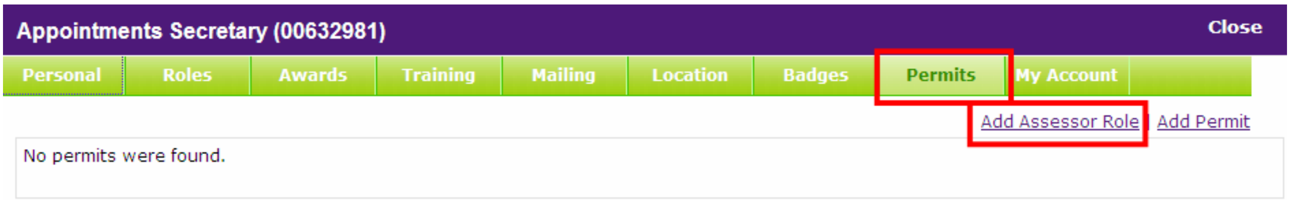
If they are leaving Scouting, the drop down box should be used to select the reason for leaving. You can then click 'Save'. If the reason for leaving is **unsatisfactory**, a Cancellation/Suspension Form (Form CS) will need to be completed and returned to the Confidential Team at Gilwell Park. If they are not leaving Scouting and are just changing roles, click on 'Add Role' (as in Fig. 3 below).

Fig. 3



7 Adding an Assessor role

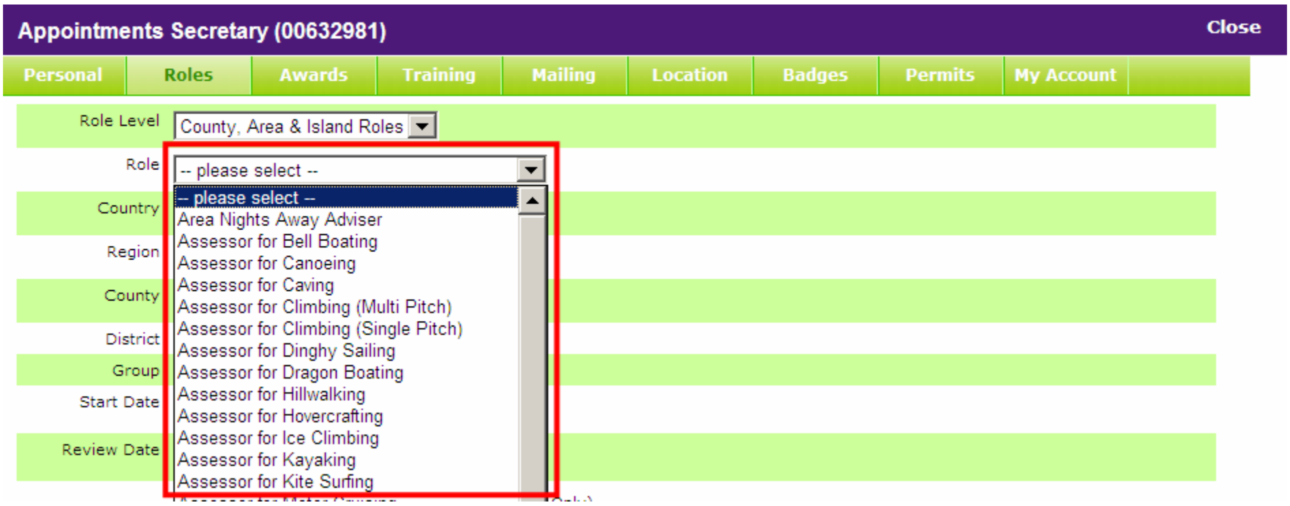
Fig. 1



Assessor roles can be added in the same way as other roles as outlined in the previous chapter. You can also use the 'Add Assessor Role' link on either the 'Roles' tab or the 'Permits' tab (shown in Fig. 1 above).

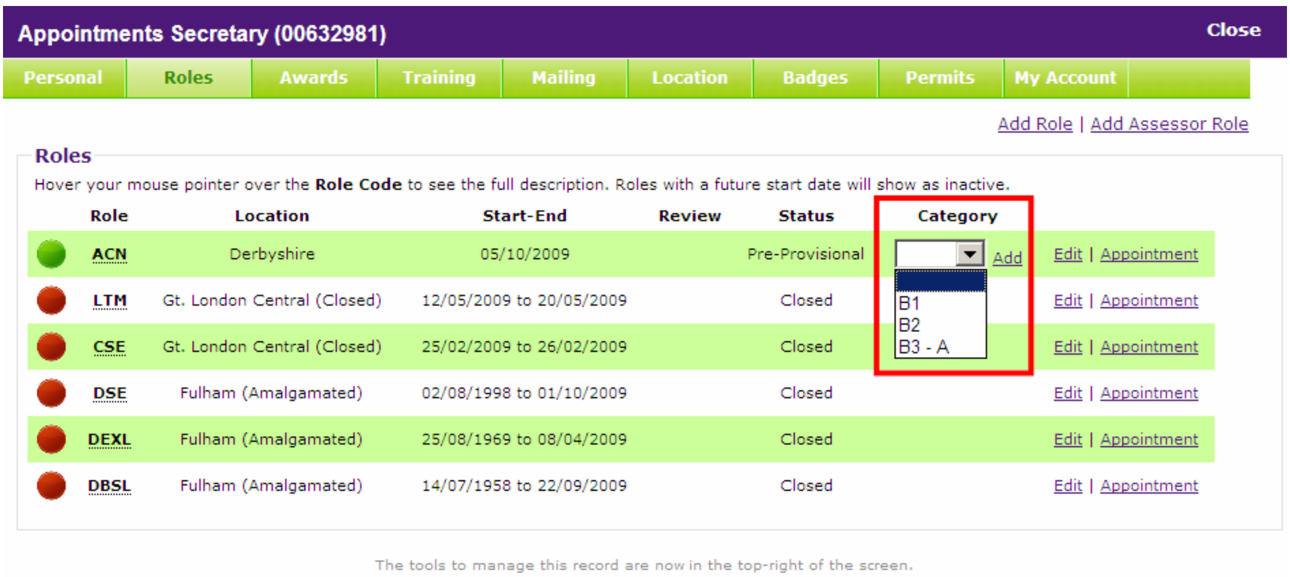
The advantage of using the 'Add Assessor Role' link is that you will only be shown the Assessor roles when adding the role (as shown in Fig. 2 below).

Fig. 2



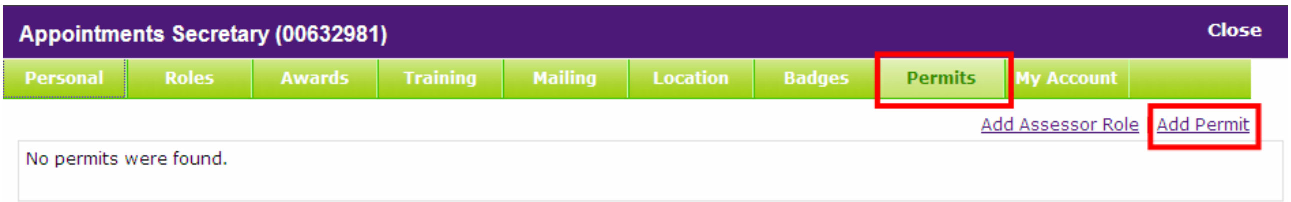
Once you have added the role, you will be asked to select the category of the Assessor (shown in Fig. 3 below). Assessor categories are hierarchical so you only need to add one role for each activity. i.e. Winter Hillwalking also covers Summer Hillwalking, B2 Kayaking also covers B1 Kayaking. Once you have added the role, you can then track the progress of the appointment as in Chapter 5 above.

Fig. 3



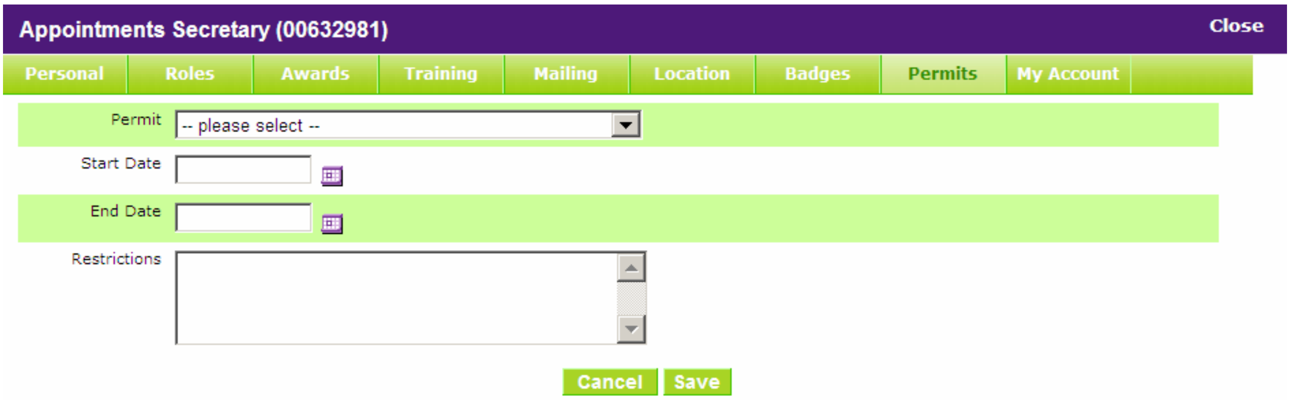
8 Adding a Permit

Fig. 1



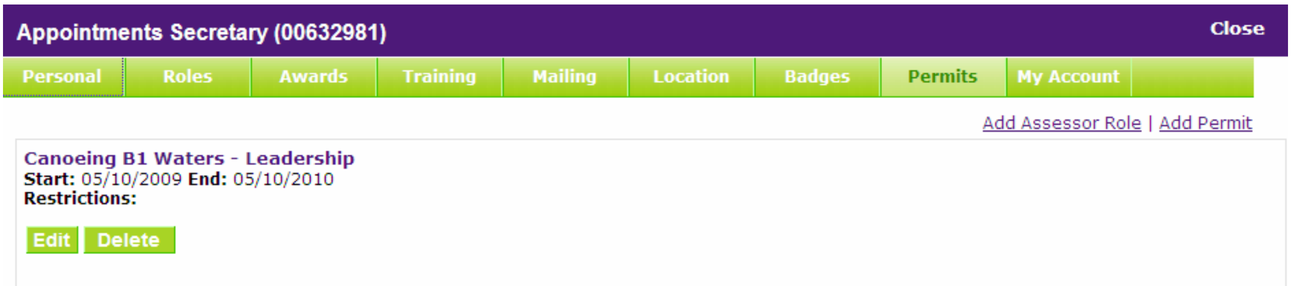
To add a permit to a record, select the ‘Permits’ tab and click on ‘Add Permit’ (shown in Fig. 1 above). You will then be taken to the screen below (Fig. 2) where you can add the details of the permit.

Fig. 2



The details entered on this page should be identical to those details on the permit card given to the permit holder. The type of permit should be available from the drop down list as this includes all permits that are available. The only exception to this is that where people hold historical climbing permits for ‘Rope Leader’, these have been renamed with the introduction of personal permits as Climbing – Personal. So for example, a ‘Climbing (Single Pitch) Top Rope Leader’ permit will be recorded as ‘Climbing (Single Pitch) Top Rope–Personal’. If any permits you need to add don’t match those in the drop down list, your ACC Activities or County Adviser for the specific activity should be able to provide further guidance. Once you have saved the details, you will be shown the details that you have recorded (as in Fig. 3) below.

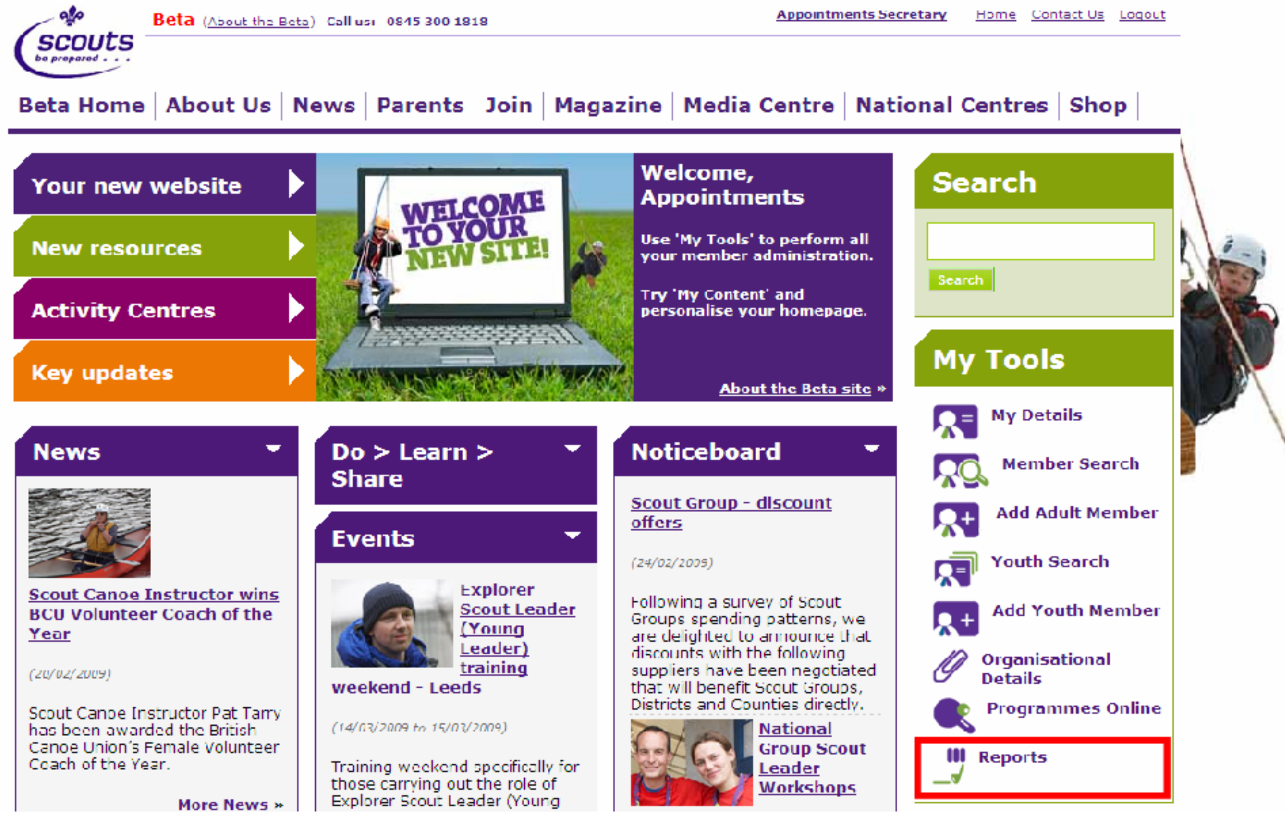
Fig. 3



A report is available under ‘Reports’ to view and manage all permit holders in your County. This allows you to sort or filter by various data, such as activity or end date.

9 Reports

Fig. 1



To make use of the reporting tools that are available to you, click on 'Reports'. You will be asked to log-in to the reporting suite (use the same username and password that you use to log-in to www.scouts.org.uk).

Once you have logged in, you will see that there is a list of reports. Some of the reports which may be of particular use to you include:

- New Appointment Process (ONLY) – *there are a series of reports to support you with the management of this process*
- Appointments – Members with Non-Full Roles
- Appointments – Review Due
- Appointments – Review Due in the Next Six Months